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ABSTRACT

Supporting performance objective 69 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual in placing telephone calls are included in this packet. (The packet is the second in a set of four on performing receptionist activities--CE 016 935-938.) The student materials include a pretest, information on using the telephone directory, types of telephone calls, two self-check quizzes (the second of which has an answer key), a posttest, and an instructor's final checklist. The instructor's manual includes directions for administering this packet, a list of supplies and materials needed, answer keys to the pretest and posttest, and the narrative script for a filmstrip. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the four packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155425

PERFORMING RECEPTIONIST ACTIVITIES
PLACING TELEPHONE CALLS

STUDENT'S MANUAL

Prepared by

Pam Harrison

These materials support
Performance Objective 69 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

PLACING TELEPHONE CALLS

PERFORMANCE OBJECTIVE

1. Given a telephone directory and a customer's name, you will be able to locate the telephone number, address, or correct spelling of the customer's name.

2. Given a case situation and a telephone, you will be able to place a local or long distance telephone call using correct telephone procedure.

DEFINITIONS OF TERMS

Many new terms will be introduced in this module. For example, WATS or wide area telecommunications is a special service that permits a caller to make station to station calls within a specific area at a reduced cost. For more information on the types of services available refer to pages 10 and 11. All new terms will be underlined so that you will notice and identify them easily.

PRE-REQUISITE

Before completing this module, the student should have successfully completed Performance Objective 68, Answering the Telephone.

PRE-TEST

If you feel you can already accomplish the Performance Objectives listed above, proceed to the next page and complete the Pre-Test. Read your instructions carefully.

PRETEST

INSTRUCTIONS:

Fill in answers to the following questions on a separate page.

1. If you call Donald Richards collect, you must first contact the _____.
2. If your boss asks you to check the spelling of a customer's name, you should use the _____ as a source of reference.
3. If David Lock works in the Personnel Department of your company, how do you find his number?
4. When a button on your telephone is lighted, this means that the line is _____.
5. When a button on your telephone is lighted and blinking, this means that the line is _____.
6. If you call Linda Jones, without the operator's assistance, you dialed _____.
7. A service that permits station to station calls made without charge to customers in a particular wide area telecommunications area is called _____.
8. A call that permits several people in different places to talk to each other is termed a _____.
9. It is important to use correct telephone procedures because you _____.
10. To find the telephone number for out-of-town customers, you would dial _____.
11. Name three preliminary steps you would do before you actually identify yourself to a person on the phone. a. _____ b. _____ c. _____.
12. List five points to consider while talking on the phone. a._____ b. _____ c._____ d._____e._____.

SEE YOUR INSTRUCTOR FOR THE CORRECT ANSWERS

If you scored 100% on the test, proceed to the post test at the end of the module.

If you missed one or more questions, turn the page and complete the Learning Activities.

All work will be evaluated by your instructor and will be graded as acceptable or unacceptable.

Easy as . . .

1, 2, 3!

DIRECTIONS

Read through your learning activities. Complete all the activities in the order given but at your own rate of speed. If you have any questions after rereading a section, seek assistance from your instructor. By the end of this module, you will be skilled in placing effective and courteous telephone calls.

LEARNING ACTIVITIES

1 READ suggested reading from a secretarial procedures book. These pages should be assigned by your teacher.

2 OBTAIN filmstrip presentation from your teacher. Set up a projector and focus on frame 1. View the presentation then proceed with Student Activity Sheet I.

3 COMPLETE Student Activity Sheet I. Then take Student Self Check I. This self check may be corrected by the student.

4 COMPLETE Student Activity Sheet II, then take Student Self Check II. Check your own answers.

5 COMPLETE the Post Test and check with your teacher for your rating. This post test will be rated using the teacher's performance checklist.

EQUIPMENT, TOOLS, RESOURCES, AND SUPPLIES

You will need the following materials in order to complete this module:

3 or 4 sheets of paper

1 pen or pencil

1 telephone (if your teacher can arrange it)

1 telephone directory

1 local company directory

1 filmstrip projector

1 cassette recorder

INTRODUCTION

PLACING TELEPHONE CALLS

As a secretary, telephone communications puts "you" in the middle of the conversation. By placing telephone calls carefully you enhance your company's communications, build their reputation, and increase their goodwill!

Your role is a vital one. The correct procedures and courtesies presented in this package will require you to use the telephone directory, company directories, and information services. In addition to these skills, you will learn the correct procedures for placing local, direct dial, person to person and WATS line calls. You will find that telephone directories serve many useful purposes in the office because they identify the correct spelling of a customer's name, address and telephone number. Remember, your telephone voice and mannerisms should sound like music to the customers' ear. Try not to sound too sharp!

STUDENT ACTIVITY SHEET I

Using the Telephone Directory – "Your Best Friend"

The telephone directory will become your "Best Friend" in many situations during your work. You can use the telephone directory to locate the spelling of a customer's name, the customer's address, or the customer's telephone number.

The telephone directory is divided into two parts, the white pages and the yellow pages. The white pages are divided A-Z with the names in alphabetic order. The yellow pages are alphabetic listings of business organizations, professional services, and products. The yellow pages come in handy when you know what you want but not where to find it, such as Picture Framing. You would look up framing in the yellow pages and find that there are several choices you can make.

If you work for a large company, you may have a company directory. This directory will be of service to you when placing calls to people inside the company. If you have to place out-of-town calls, your long distance operator will be able to give you the number. Find the line that is not in use and depress the button. As you lift up the receiver, you will notice that the button lights up. This is to warn others that the line is in use and not to use it. If all the lines are lighted, wait until a light goes off before choosing a line. You are now ready to dial your number. Look at Pictures I and II on pages16 and 17. Picture I is a dialtone phone and II is a pushbutton phone.

After the number is dialed and no one answers after approximately ten (10) rings, hang the receiver up and place the call later. This was sufficient time for the party to answer. If the party does answer, state your name, the company's name, and your business. You should have all needed reference materials with you and should have already decided what you are going to say when your party answers the telephone. Speak directly into the receiver distinctly and courteously. Avoid slang expressions. Use good grammar. Remember that you are forming the impression that the person called will have of your company. Courtesy counts!

End the conversation promptly and tactfully. Do not waste your time or that of the other person by needlessly extending the conversation. If you have received a reply to your questions, you have completed your call successfully. Always remember to thank your caller!

TURN THE PAGE AND COMPLETE STUDENT SELF CHECK I

STUDENT SELF CHECK I

Telephone Directory

Using the telephone directory provided by your instructor, look up the following names and businesses in the yellow and white pages. Record the correct telephone numbers on a separate sheet of paper. Do not write in this book.

1.

2.

3.

4.

5.

Using a company directory provided by your instructor look up the following names and departments and record on a separate sheet of paper the correct telephone numbers.

1.

2.

3.

4.

5.

Turn the page and check your answers.

STUDENT SELF CHECK I

ANSWERS

1. _____
2. _____
3. _____
4. _____
5. _____

1. _____
2. _____
3. _____
4. _____
5. _____

TURN THE PAGE AND READ STUDENT ACTIVITY SHEET II

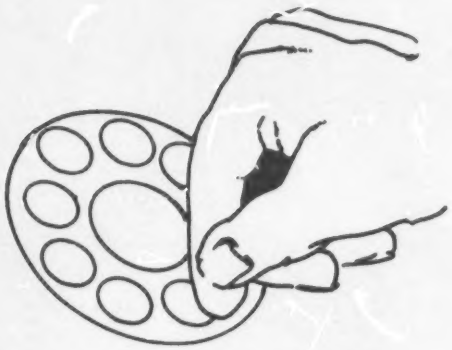
STUDENT ACTIVITY SHEET II

Placing Telephone Calls

The first thing the secretary should do before placing a telephone call is to verify the telephone number. This is important in saving time and trouble. You can verify the number by using the telephone directory, company directory, or as a last resort, by dialing the directory assistance operator. If you are placing long distance calls, be sure to keep a log stating who you called, when, where, and what business was conducted. This will be proof of all long distance calls made by you.

After verifying the correct telephone number, you select a line to use in placing your call. To do this, you must be familiar with your telephone. Study the pictures of the two types of phones on pages 16 and 17.

Notice the buttons at the bottom of the telephone. These buttons indicate the lines available for use. If any of these buttons are lighted, they are in use at the present time and should not be used. If a button is blinking a caller is on hold so don't use that line either.



To dial or not to dial...that is the question.

Basically there are two ways to dial long distance. One way to dial is with operator assistance, such as person to person calls. Alternately, direct distance dialing does not use the operator.

Direct Distance Dial (or station to station)

Here are several advantages of direct dialing:

1. It saves time.
2. It saves money.
3. It is easy.

In order to direct dial a long-distance number, a secretary dials the customer without operator assistance, similar to a local call. Charges begin when the called telephone answers.

WATS – Wide Area Telecommunications

A WATS line service permits a caller to make station to station calls to persons within a specified area without operator assistance. Monthly charges are made regardless of the number of calls.

A secretary is frequently asked to dial long distance calls. Other methods of dialing require operator assistance.

Person to Person

The person to person method requires the caller to dial and tell the operator who he or she wants to call. Rates are higher than the station to station method. However, charges don't begin until you actually start talking to a particular person.

"Collect" Calls

A secretary is frequently asked to accept "collect" calls from clients. This means that a customer calls and tells the operator that he or she wants to place a "collect" call to your company. If you accept, your company pays the charges.

Conference Calls

Frequently, it is necessary to talk with several different people in different places at the same time. The operator can arrange this service whenever a "conference" is desired.

CONFERENCE CALLS

Tell the operator you wish to
make a conference call. The operator will gladly arrange it.

STUDENT SELF CHECK II

Placing Telephone Calls

DIRECTIONS: Using the situation provided below, write on a separate sheet of paper the conversation that might take place.

SITUATION: You are receptionist for Mr. Allen Smith, Vice President of See-More Travel Agency. You are to call Ms. Sandy Bonner of Seagull Airlines to confirm reservations for a customer, Mr. Stuart Balor, from New York to Chicago on February 16. Your information shows that the plane leaves New York at 10:43 a.m. and flies nonstop to Chicago, arriving at 1:58 p.m. Your records do not show the flight number. Telephone number of Seagull Airlines is 854-2284. This is a local call.

1. List the steps you would take in preparing for the telephone call.

2. Dial the number.

3. Conversation:

   Telephone Rings

   Seagull Airlines (SA): Seagull Airlines, Mr. Wade speaking. May I help you?

   YOU:

   SA: Just a moment please.

   YOU:

   Ms. Bonner: Sandy Bonner speaking. May I help you?

   YOU:

   Ms. Bonner: Would you hold please while I check this. Mr. Balor's flight number is 946 and his reservation is confirmed. I will put his ticket in the mail to you today.

   YOU:

TURN THE PAGE AND COMPARE YOUR CONVERSATION WITH THE ONE GIVEN.

SELF CHECK II ANSWERS

1. Verified telephone number, pulled Mr. Balor's file for reference, got pencil and paper for notes

2. Dialed 854-2284

3. SA: Seagull Airlines, Mr. Wade speaking. May I help you?

   YOU: Yes. May I please speak to Ms. Sandy Bonner?

   SA: Just a moment please.

   Ms. Bonner: Sandy Bonner speaking. May I help you?

   YOU: My name is _____ and I am receptionist for Mr. Allen Smith of See-More Travel Agency. I am calling to confirm reservations for Mr. Stuart Balor on February 16. He is flying from New York nonstop to Chicago. His plane leaves New York at 10:43 a.m. and arrives at Chicago at 1:58 p.m. I also need to know the flight number.

   Ms. Bonner: Would you hold please while I check this? Mr. Balor's flight number is 946 and his reservation is confirmed. I will put his ticket in the mail to you today.

   YOU: Thank you, Ms. Bonner, for your help. Good-bye.

REVIEW:

Did you state your name, firm, and business promptly?

Did you speak distinctly and courteously?

Did you present a favorable impression of your company?

Did you end the conversation promptly and tactfully?

Did you avoid slang and use correct grammar?

After you have successfully completed Student Activities I and II, turn the page and complete the Post Test. This test will be evaluated by your teacher. If you feel that you have not accomplished the objectives of this module, turn back and review the part which is not clear to you or seek assistance from your teacher.

POST TEST

DIRECTIONS: Check with your teacher to learn the preferred method.

METHOD I – Using a tape recorder, tape and telephone, record the appropriate conversation from the situation given below.

METHOD II – Using a telephone and with a teacher present, orally present the conversation that might take place in the situation given.

SITUATION: You are receptionist for Mrs. Joan Smyth. Mrs. Smyth is a lawyer and has to fly to Denver for a legal convention January 16-20. She already has plane reservations. She will arrive in Denver at 2:30 p.m. and will need hotel accommodations for four (4) nights. She wants you to call the Williston Hotel long distance in Denver and make reservations. The telephone number is 724-9765. You should also check to see if the hotel provides transportation to and from the airport. Area code is 303.

Using either Method I or Method II write or record the steps leading to the call and complete the missing conversation. Write on a separate sheet of paper. If you are using Method I, be sure and record both sides of the conversation.

STEPS:

CONVERSATION:

Williston Hotel (WH): Williston Hotel, may I help you?

YOU:

WH: Hold please while I check this. -- I can give Mrs. Smyth a room on the seventh floor. Room 717.

YOU:

WH: We will provide a car to pick her up at 2:30.

YOU:

WH: I will put her reservation confirmation in the mail today.

YOU:

GIVE YOUR ANSWERS TO YOUR TEACHER TO BE GRADED.

LAP

Student _____

Date _____

PLACING TELEPHONE CALLS

Instructor's Final Checklist

Check the student's performance in the following elements of placing telephone calls.

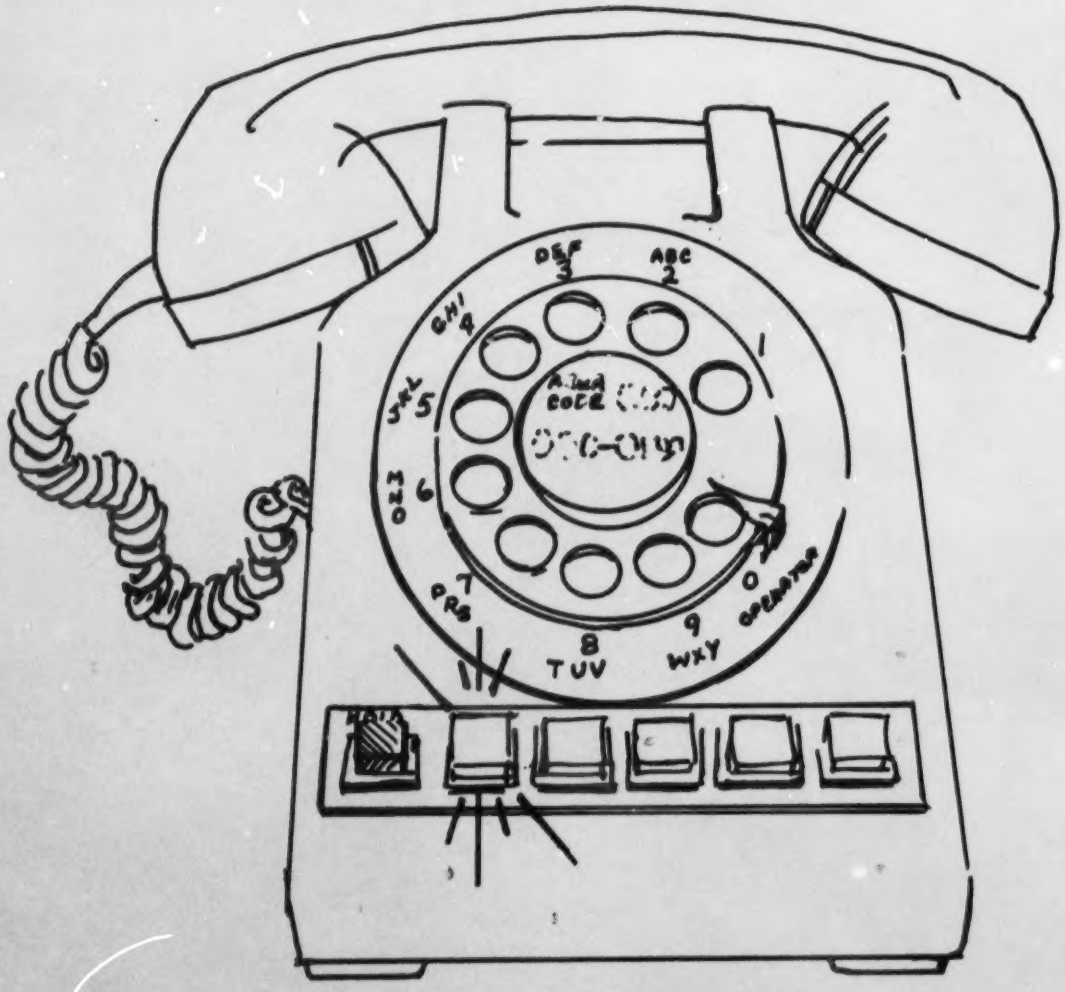
Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
The student:				
1. Verified the number before calling	[ ]	[ ]	[ ]	[ ]
2. Chose the correct line	[ ]	[ ]	[ ]	[ ]
3. Allowed the phone to ring ten (10) times	[ ]	[ ]	[ ]	[ ]
4. Gave name, Company's name, and stated business at the beginning of call	[ ]	[ ]	[ ]	[ ]
5. Had conversation planned	[ ]	[ ]	[ ]	[ ]
6. Explained business slowly and clearly	[ ]	[ ]	[ ]	[ ]
7. Gave information to be recorded slowly and clearly	[ ]	[ ]	[ ]	[ ]
8. Confirmed information	[ ]	[ ]	[ ]	[ ]
9. Accomplished purpose of call	[ ]	[ ]	[ ]	[ ]
10. Closed conversation promptly and tactfully	[ ]	[ ]	[ ]	[ ]
11. Thanked party called for help	[ ]	[ ]	[ ]	[ ]
12. Replaced the telephone gently	[ ]	[ ]	[ ]	[ ]
13. Recorded long distance calls in log	[ ]	[ ]	[ ]	[ ]
14. Spoke distinctly and directly into the mouthpiece	[ ]	[ ]	[ ]	[ ]
15. Avoided slang expressions	[ ]	[ ]	[ ]	[ ]
16. Used good grammar	[ ]	[ ]	[ ]	[ ]
17. Created a good impression for company	[ ]	[ ]	[ ]	[ ]

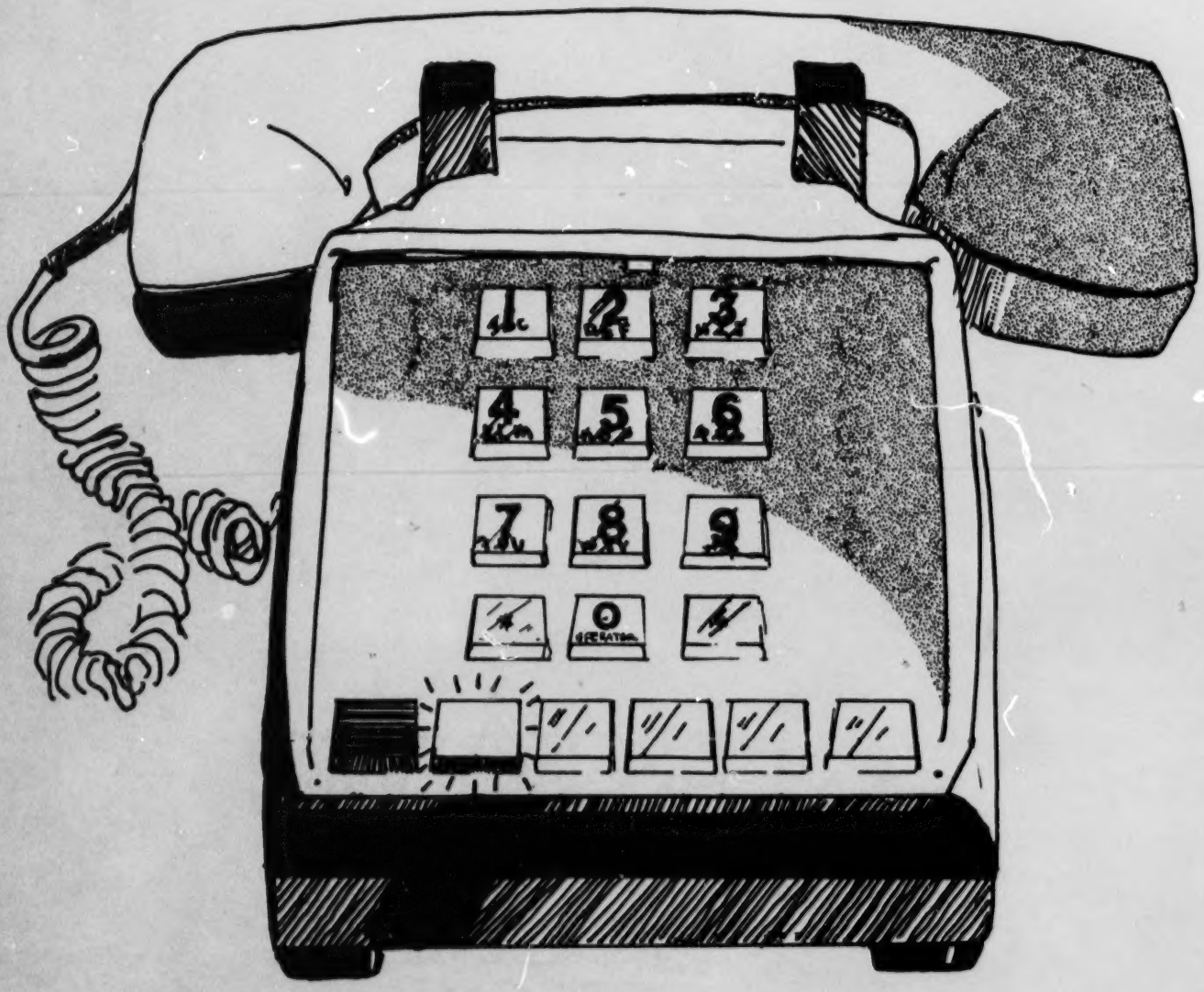
COMMENTS:

PICTURE I



DIALTONE PHONE

PICTURE II



PUSHBUTTON PHONE

PERFORMING RECEPTIONIST ACTIVITIES
PLACING TELEPHONE CALLS

INSTRUCTOR'S MANUAL

Prepared by

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TO THE TEACHER

This module has been designed to be used by the individual student or by the entire class. The following materials will be needed in order to complete this mdoule:

3 or 4 sheets of paper
1 pen or pencil
telephone (Check with your telephone company; they may be able to set up a telephone for you.)
telephone directory
local company directory
filmstrip projector
cassette tape recorder

In Student Self-Check I, page 7, you should insert 5 names and businesses from a telephone directory and 5 names and departments from a company directory for the students to locate numbers using the directories provided by you. Then, fill in the correct answers for the Self-Check on page 9.

The Instructor's Final Checklist, page 13, is a perishable item that you will need to duplicate.

It is recommended that the student tape a conversation so he/she will be able to hear how his/her voice sounds.

The Post Test can be taken in your presence or recorded on a tape recorder. If the student chooses to tape the Post Test, a tape recorder and tape should be provided.

The answers to the Pre Test and Post Test are on the following pages. A narration for the filmstrip is provided for your use in recording the cassette.

This module should take the average student two 50-minute class periods to complete.

PRE-TEST ANSWERS

1. operator
2. telephone directory
3. check your company directory
4. being used
5. on hold
6. direct (or station to station)
7. WATS service
8. conference call
9. want to create a favorable impression of your company
10. the long distance directory assistance
11. a. Verify the phone number before calling.
    b. Select the proper line.
    c. Allow sufficient ringing time.
12. a. Explain clearly the nature of the call.
    b. Give information slowly and distinctly.
    c. Confirm information to assure understanding.
    d. Express appreciation.
    e. Accomplish the purpose(s) of the call.

POST TEST ANSWERS

STEPS:

1. Verify the telephone number.
2. Plan the conversation.
3. Dial the number long distance 1-303-724-9765.
4. State your name, company's name, and business.

CONVERSATION:

WH: Williston Hotel, May I help you?

YOU: Yes, my name is (student's name). I'm calling for Ms. Joan Smyth - S M Y T H. I would like to make reservations for her for four (4) nights. January 16, 17, 18, and 19.

WH: Hold please while I check this – I can give Ms. Smyth a room on the seventh floor. Room 717.

YOU: That will be fine. Ms. Smyth will arrive at the airport at 2:30 p.m. on the 16th. Does your hotel provide transportation from the airport?

WH: Yes, we will have a car meet her at 2:30.

YOU: Could you please send Ms. Smyth's hotel reservation confirmation to me as soon as possible?

WH: I will put it in the mail to you today.

YOU: Thank you for your help. Good-bye.

NARRATION FOR FILMSTRIP

OBJECTIVE 69
PLACING TELEPHONE CALLS

1. Meet Chris! She is placing telephone calls for Ann Nye, Vice President of Miller's Machinery. (narrator)
2. Ann has asked Chris to dial Turner's Automotive, a local distributor to confirm order No. 2974 for 100 cans of Miller's Magic lubricant. (narrator)
3. Let's watch Chris place this call. (narrator)
4. First, she checks to see if Mr. Turner's phone number is in her desktop file of frequent customers. (narrator)
5. Sometimes, her file doesn't contain new customers, so she checks the phone directory. (narrator)
6. She finds the "T" listings in the white pages. (narrator)
7. Then she scans the alphabetic listings. (narrator)
8. Chris finds the listing, (narrator)
9. then writes the number down for her file. (narrator)
10. She selects a line that isn't being used, (narrator)
11. then dials the number. (narrator)
12. She listens for the 10 rings and then hangs up the receiver gently. (narrator)
13. Chris checks her watch. It's only 8:30. (narrator)
14. Later she redials the number. (narrator)
15. Hello, Turner's Automotive. Bill Lyle. (male voice)
16. Hello! This is Chris Jackson at Miller's Machinery. (secretary's voice)
17. Ann Nye has asked me to confirm your order No. 2974 for 100 cans of Miller's Magic lubricant. (secretary's voice)
18. Yes that is correct. Will I get a 2% discount if I pay within 10 days? (male voice)
19. Certainly, our terms are 2/10, net 30. That means your discount will be $20, Mr. Lyle. (Speak slowly.) (secretary's voice)

20. $20! That's good news. Will delivery be before the 15th? (male voice)

21. Yes, Jack Dawson will deliver your order on February ninth in the morning. (secretary's voice)

22. It would be better to deliver in the afternoon because I have fuel delivery in the morning. (male voice)

23. OK, that can be arranged. Are there any other changes or questions, Mr. Lyle? (secretary's voice)

24. No, thanks for the call. (male voice)

25. You're welcome! Be sure to call if we can help you. Goodbye. (secretary's voice)

26. Due to the time change, Chris calls Jack Dawson long distance in Houston. She verifies his number with the long distance directory operator. (narrator)

27. After reaching Jack Dawson's office, she records the name, place, date, and number of long distance calls in her steno book in order to check the accuracy of the monthly bill. (narrator)

28. If you watch Chris closely, you will notice that when she places calls she: (narrator)

29. verifies the phone number,

30. selects the appropriate line,

31. gives identification promptly and pleasantly,

32. explains clearly and slowly all the necessary information,

33. confirms all information courteously,

34. thanks the caller,

35. replaces the receiver gently and

36. records all long distance calls.

37. Remember these suggestions and your calls will be welcomed, too! (narrator)